FY 2013 – 2014

eProcurement Quick Reference Guide
San Diego Unified School District

Includes updated screenshots of Peoplesoft version 9.2

With "live links" to District website pages (electronic copy only)

How to Place Specific Types of Orders

PeopleSoft Financials

SDUSD - IT Training

TABLE OF CONTENTS

Have you moved to a new location?

Always remember to update your location and phone number in PeopleSoft!!

Human Resources → Self Service → DWA Security Request

Refer to page 2 for detailed instructions

URGENT! – WHEN YOU CHANGE JOBS
ALSO CHANGE YOUR NEW LOCATION AND PHONE NUMBER!

Here's the Problem

The Strategic Sourcing and Contracts Department receives numerous phone calls from school district employees looking for their ePro Requisition inventory (stock) item orders that they haven't yet received. About 95% of the time the order was completed, **but it was delivered to the employee's previous work site**. This happens because many employees fail to login to PeopleSoft HCM (Human Capital Management, a.k.a. Human Resources) and fill out the **DWA Security Request** to have their default location and telephone number (where you work) changed to their new job site.

Failure to update your location creates many problems:

- Delivery to wrong site
- Delay of delivery to correct site
- Wasted time and resources used for re-routing of deliveries
- Wrong delivery not discovered until the materials are overdue.

PeopleSoft software cannot automatically update all your default settings in the system. You must update this information. This will ensure that your orders will arrive for you in a timely manner.

Here's the Solution

So when you change job sites and phone numbers, use the **DWA Security Request** form to update your default location. The **DWA Security Request** form is found within the **PeopleSoft Human Resources online system**. You must login to PeopleSoft Human Resources first *(NOT the financials side)*. After you login, the navigation path to get there is:

Human Resources → Self Service → DWA Security Request

To read an illustrated, step-by-step job aid that shows how to complete the DWA Security Request form, go online and follow this Internet path:

www.sandi.net → Staff → Technical Support & Resources → PeopleSoft → Reference Materials

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INTRODUCTION

PLEASE NOTE: In order to use this Quick Reference Guide <u>you should have already have attended an eProcurement training class, and know how to create an eProcurement (ePro) requisition</u>. This Guide does not show how to create requisitions. It shows the proper data/information to be entered into a requisition form for certain kinds of items only.

For information on eProcurement classes being offered, please go online to our SDUSD IT Training website: **www.sandi.net → Staff → Technical Support & Resources → PeopleSoft → Training Opportunities→** *(sign in with your Employee ID number and password)*

This Guide is intended for use by ePro Requesters. ePro Requesters are SDUSD employees who use our online PeopleSoft Financials eProcurement ordering system to purchase goods and services for their schools, offices, and departments.

This Guide is not a replacement for any of the comprehensive eProcurement Training Handbooks. The handbooks provide all the information on how to use the eProcurement online system *(how to login, how to place all the different types of orders, what to click with the mouse and when to click it, etc…)*.

This Quick Reference ePro Ordering Guide is designed to be used as a supplement to the handbooks. The Guide includes the following key information:

- A basic, informative direction on the precise wording you must enter into an ePro requisition form for specific types of orders in which errors can be easy to make.
- Who to contact when you have questions on specific items you are ordering.
- Where to find SDUSD prices on certain items.
- Tips and advice on how to place successful orders so they can arrive faster, with fewer delays.

It is important to understand that incorrect ePro requisitions can cause:

- Wasted funds.
- Delays in order processing and receipt of goods.
- Wasted time for Requesters across the district, as well as for Strategic Sourcing and Contract Services Department personnel.
- Delays or loss of goods and services.

By using this Guide, Requestors can help cut down on the problems caused by improperly created ePro requisition orders.

DIRECTORIES
Strategic Sourcing and Contracts and Accounts Payable

This is a list of the SDUSD staff within our Strategic Sourcing and Contracts. These are the people who work to complete our purchases. On the following page is a list of Accounts Payable Personnel. (These lists are always subject to change.)

Strategic Sourcing and Contracts					
Name		Phone	Fax	E-mail	Products, Services, Commodies	Vendor Examples
Bunch	Karl	(858) 522-5823	(619) 542-5723	kbunch@sandi.net	Classroom Supplies, DVDs, Music & Musical Instruments, Custom and Outside printing, Testing Materials, Science	School Specialty, Lakeshore, CM School Supply, Barnes & Noble, Nick Rail, Southwest Strings, Graphiques, Frey, Fischer, Riverside, and Pearson
Ethridge	Natalie	(858) 522-5825	(619) 542-5725	nethridge@sandi.net	Professional & Construction Services	Audio Assoc., Southland Electric, Saturn Electric, Ty Hunter Design
Floyd	Mark	(858) 522-5815	(619) 542-5715	mfloyd@sandi.net	Computers, Computer equipment, printers & supplies, Software, Online subscriptions, Printer Toner Cartridges.	Meredith Digital, AreyJones, Apple, CDWG
Gabbard	Liz	(858) 522-5822	(619) 542-5722	lgabbard@sandi.net	Overall contracting support for PPO, Custodial supplies, Lumber, Sheds, Landscaping, Lighting, Concrete, Asphalt, Refuse removal	Waxie, Grainger, Graybar, HD Supply, WESCO
Vacant Position (see John Groll for Assistance)		(858) 522-5821	(619) 542-5721	jgroll@sandi.net	Office Supplies, Paper, Fuels, Special Ed Equip & Supplies, Physical Education , Sporting Equip & Supplies, Medical Dental/Supplies, Health, Safety, Postage, Office Equip Maintenance, Independent Contractor Agreements	Indpendent Stationers, Office Depot, Rifton, Flaghouse, Soco, York Ins, and Alliant Ins Company
Haggerty	Patrick	(858) 522-5812	(619) 542-5712	phaggerty@sandi.net	e-Rate Telecommunications	Cox Communications, AT&T
Herman	Kathleen	(858) 522-5824	(619) 542-5724	kherman@sandi.net	Payment Only, Confirmation, Magazine Subscriptions, Furniture & Furniture Rentals, CustomStamps and Name Plates	Crawford and Co Furniture, GM Business Interiors, Virco Mfg
Hippee	Linda	(858) 522-2831	(619) 542-5731	lhippe@sandi.net	Construction Services	Soltek Pacific Construction, Co., Straight Line General Contractors
Schoeppler	Eric	(858) 522-5813	(619) 542-5713	eschoeppler@sandi.net	Food, Refrigerators, Cafeteria supplies, Financial Consultant, Early Childhood Program, Career Counseling & Training Ed, and Human Resource	CISCO Foods and other Food Distributors and Suppliers, Various Consultants Contracts, ...etc.
Smolen	Katherine	(858) 522-5811	(619) 542-5711	ksmolen@sandi.net	Cell Phones, Walkie Talkies (Radios), Large Copiers, Transportation, White/Yellow fleet, Auto/Bus parts	Richo, SHARP USA, NAPA, Wells Fargo
Gomez	Julio	(858) 522-5867	(619) 542-5726	jgomez@sandi.net	Audio /Visual Art, Text, Supplemental, and Library Books Supplies, Teaching Aids, Map, Toys, Posters, Musical Instruments, Sheet Music, Media	Dick Blick, Aaron Bros., Best Buy, Gov Connection, Rigby, Scholastic, B&N, Gaylord, and Brodart
Viado	Janice	(858) 522-5818	(619) 542-5718	jviado@sandi.net	Special Education, SES and Student Services Program contracts	Speech, Language Consultants, SDSU, UCSD, Rady's Childrens Hospital, Red Cross

SAN DIEGO UNIFIED SCHOOL DISTRICT
Office of the Controller
Accounts Payable Department - Room 3141

Vendor Assignments Effective 10/24/13   **A/P Fax Number: (619)725-7769**

Vendors are assigned to A/P staff alphabetically by the payee's last name or company name.

Employee Travel Authorizations & Expense Reports are assigned to A/P staff alphabetically by traveler's last name.

ALPHA VENDOR NAME	A/P SPECIALIST	PHONE NUMBER (619)	E-Mail Address:
A	Magda Henein	725-7760	mhenein@sandi.net
B	Abe Caluza	725-7771	jcaluza@sandi.net
C	Nancy Miraflor	725-7758	nmiraflor@sandi.net
Cellular Telephone Service	Kitty Jackson	725-7751	cjackson1@sandi.net
D	Tina Jair	725-7764	tjair@sandi.net
E	Stephanie Trump	725-7765	strump@sandi.net
F	Phuong Pham	725-7761	ppham@sandi.net
G	Sheryl Stearns	725-7757	sstearns@sandi.net
Gas & Electric / Utilities	Nancy Miraflor	725-7758	nmiraflor@sandi.net
H	Cristi Childers	725-7683	cchilders@sandi.net
I	Cindy Stephens	725-7766	cstephens@sandi.net
J	Cindy Stephens	725-7766	cstephens@sandi.net
K	Margaret Gomes	725-7768	mgomes@sandi.net
L	Abe Caluza	725-7771	jcaluza@sandi.net
M	Phuong Pham	725-7761	ppham@sandi.net
N	Tina Jair	725-7764	tjair@sandi.net
O	Margaret Gomes	725-7768	mgomes@sandi.net
P	Cindy Stephens	725-7766	cstephens@sandi.net
Q	Tina Jair	725-7764	tjair@sandi.net
R	Stephanie Trump	725-7765	strump@sandi.net
S	Cordae Auld	725-7759	cauld@sandi.net
Telephone Service - Land Lines	Stephanie Trump	725-7765	strump@sandi.net
T	Tina Jair	725-7764	tjair@sandi.net
U	Sheryl Stearns	725-7757	sstearns@sandi.net
V	Cristi Childers	725-7683	cchilders@sandi.net
W	Kitty Jackson	725-7751	cjackson1@sandi.net
Water/Sewer Utility Service	Cindy Stephens	725-7766	cstephens@sandi.net
X	Stephanie Trump	725-7765	strump@sandi.net
Y	Cristi Childers	725-7683	cchilders@sandi.net
Z	Stephanie Trump	725-7765	strump@sandi.net

ATTACHMENTS TO ORDERS

Whenever you need to include a non-PeopleSoft document to an ePro Requisition order, such as a quote or estimate from a vendor, hotel reservation or some typed list, or form, the best way to ensure that it gets where it needs to go is to attach it to the ePro Requisition order itself…electronically.

The most common ways to obtain such a document are:

A) Ask the vendor to send you the document via e-mail attachment, preferably as a PDF-formatted document. You can open it with Adobe Reader© and save the document to your computer.

B) Type up the document yourself in a word processing software program such as Microsoft Word, and save it to your computer.

C) If all you have is an actual hardcopy of the document in hand, you can use a scanner to scan the document into your computer and save it as a PDF file.

Once you have the document saved on your computer, you need to attach it to your ePro requisition (your order) before you submit it for approval. There is a Job Aid (illustrated, step by step instruction sheet) available on pages 7-8 that shows you how to do this. You can also find the Job Aid online by clicking on this link(part of the "2014 eProcurement Training Handbook").

Here are the simple steps, in brief:

1) After completing the ePro requisition order (before you submit it) click to the **Review and Submit** screen of the requisition form.
2) Click the **Comments** icon. *(It looks like a cartoon word balloon).*
3) Click the **Add Attachment** icon.
4) Click the **Browse** button and locate the file.
5) Click the **Upload** button.
6) Click **OK**.
7) Click the **SAVE** button**.**

Upload Attachments to Your ePro Order
### Attach Files to Go Along with Your Orders

When any document *(estimate, list, spreadsheet, receipt, etc.)* must accompany an eProcurement requisition, the preferred procedure is to electronically upload *(attach)* the document to the requisition before submission. Typically, such document attachments provide necessary information in order to process the order. An example of this is when you place an order that includes a written estimate, and you want that estimate to accompany the ePro requisition.

This Job Aid walks you through the steps to upload/attach a document to an item on an ePro requisition. The steps illustrated below begin from the point at which we have already created the requisition, and we are starting from the **Checkout** screen *(used to be called the **Review and Submit** scree).*

1. Locate the line item to which you want to attach a document or other type of file. Scroll over to the far right side of the screen, and click on the **Add** link next to the empty text bubble.

2. Click the **Add Attachments** button.
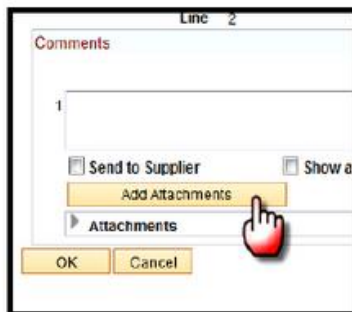
3. If you see this **SQL** error message pop up, just click **OK** and ignore it. It's a glitch in the software that doesn't mean anything. The IT folks are working to get rid of this message. Just know that it won't keep you from completing any tasks in PeopleSoft.
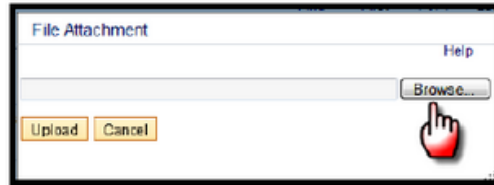
> Message
>
> A SQL error occurred. Please consult your system log for details.
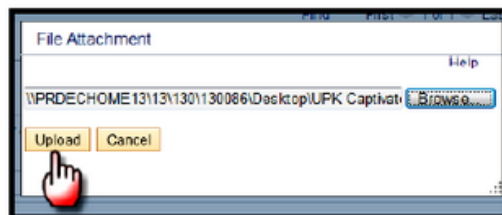>
> OK
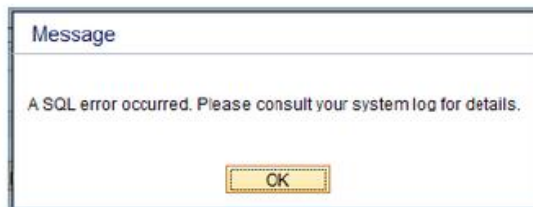
January 2014
66

eProcurement 9.2

4. Click the **Browse** button. Locate the document or other type of file on your computer you want to attach to this ePro order. When you find the file, double-click on it.

5. When you see the file loaded into the textbox, click **Upload**.

6. You'll see that the file has been attached. You can add another file; click **View** to see what's in the file itself; click a checkmark to **Send to Supplier** so they will see the attachments; and click **OK** to continue with the order.
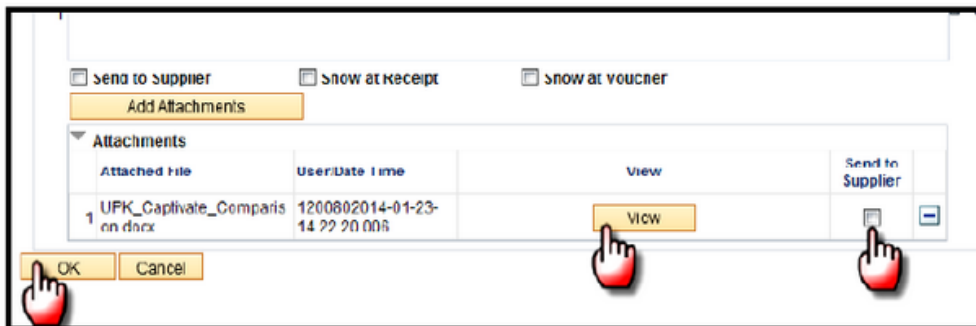
7. After you clicked OK, you'll be back on the Checkout screen. Over on the right side, where you originally clicked **Add**, it now says **Edit** with a paper clip icon, to show that there is an attachment.

You can then finish up the order normally *(enter budget string, run the budget check, and submit).*

SPECIAL REQUEST ORDERS (ePros)

As you probably already know, there are many different kinds of Special Request items you can order on an eProcurement requisition form, and nearly an equal number of different ways in which to fill in those requisitions. The problem most often experienced is that Requesters make mistakes which then delay the orders… and nobody wants delayed orders.

This Guide contains illustrated examples of several correctly filled out Special Request ePro requisitions for items that are typically ordered across the school district. To begin, this page illustrates how the correct information should be entered into the fields for any *generic* Special Request order.

Item Description: Always begin with a noun for the item, followed by the Make, Model, Color, Size, Part Number, and any other details that describe exactly what you are ordering. Include number of titles or items in a set/kit. Be as specific as you can.

Unit of Measure: Choose appropriate unit. Most common one is EA for Each (individually packaged items).

Due Date:

For **Goods**, the date you want delivery.

For **Services**, enter the date the service will be completed by.

Price: Enter the price per unit without tax or shipping.

Quantity: Enter the number of units you want of the item. Example: If the item comes packaged in pairs, and you want 4 items, then enter **2**, for 2 pairs.

Special Requests ?
Enter information about the non-catalog item you would like to order:

Item Details
*Item Description: Bookcase Virco 42" H x 36" W x 12" D Steel Three Shelf, Putty, SKU #: VR1741
*Price: 481.11
*Quantity: 1
*Category: GDS_4301
*Currency: USD
*Unit of Measure: EA
Due Date: 04/15/2014

Supplier
*Supplier ID: 0000002661
Supplier Name: Virco Manufacturing Corp
Suggest New Supplier

Additional Information
John Doe (619) 555-1212 ABC Elementary School. Bookcase needed for classroom #204. Deliver to Building 200

☐ Send to Supplier   ☐ Show at Receipt   ☐ Show at Voucher

Request New Item
☐ Request New Item   An email notifictaion will be sent to a buyer regarding this new item request

Category: Enter the correct Category for this item. If you aren't sure, look it up. Refer to the Job Aid entitled *"How to Find Categories for Special Request Items".*

Vendor: Choose the vendor you want, or else suggest a new vendor. Without a vendor stated here, our Buyers won't know who to order from.

Additional Information: Always enter your Name, Phone Number, and Site where you work. Then, enter details about the order that justifies the purchase, and, when necessary, provide any notes you want the Buyer to see. DO NOT include description or Part Number here.

SPECIAL REQUEST CELL PHONE EXAMPLE
For Cellular Phones Handset
(*Service or plan not included in example*)

Go to http://www.sandi.net/page/2165

- Select cell phones
- Select cell phone options
- Select AT &T ordering instructions or iPhone ordering instructions

San Diego Unified
SCHOOL DISTRICT

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DISTRICT | PARENTS | STUDENTS | STAFF | COMMUNITY | BOARD OF EDUCATION

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Telecommunications

- Overview
- Cell Phone Options
- Get District Email on Your Mobile Device
- Radios

Home ▶ Departments ▶ Telecommunications

Telecommunications

- Cell Phone Ordering, Receiving, Invoicing and Customer Service Information
- To learn how to get district email on your cell phone, visit the *Common Tasks* section of the Email Support & Resources page.
- Guidelines for Ordering Cell Phones

**Key Contact**
Amanda Jones
ajones1@sandi.net
(619) 725-7489

All San Diego students will **Graduate** with the **Skills, Motivation, Curiosity** and resilience to **Succeed** in their choice of **College** and **Career** in order to **Lead and Participate** in the society of **Tomorrow**.

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Our Online Communities

1. Once you have a new, blank ePro requisition form on your screen, click the **Special Request** tab.

2.
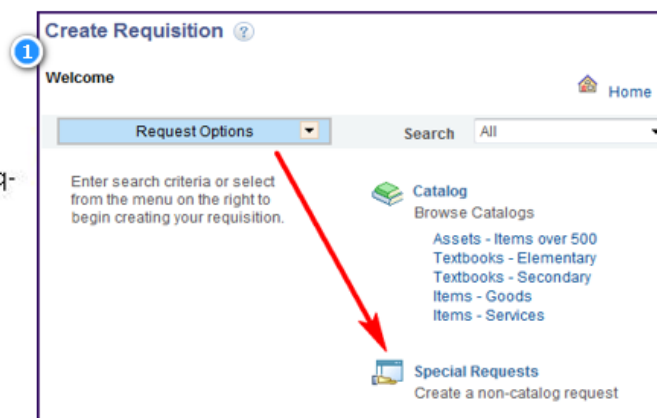
- **Item Description:** Type the following information into the Description field: **Cell Phone(s) (include make, model, description like this example: Samsung 8500 in red)**
- **Price Example: 150.00** *(No tax).*
- **Quantity: 1**
- **Category**: GDS_4301
- **Unit of Measure: EA**
- **Due Date:** Put a future date. **Example: 06/30/2014**
- **Vendor: AT&T**
- **Additional Information:** First always type your own **name, phone**, and **site location**. Include: "Please deliver all equipment to Chris Doe; Information Technology; Ed Center Rm. 1017; (619) 725-7469 (Office); (619) 725-7540 (Fax); cdoe@sandi.net". Also include Site POC, Service Provider Account number, Name of who will use the phone & their phone number.

SPECIAL REQUEST
TERM P.O. EXAMPLE

Term Purchase Order. This is a purchase order that obtains certain goods, services and/or set of services for a defined term of time. Example: You order a term P.O. that buys 12 months' worth of services with a ceiling or not to exceed price or until the end of a term *(span of time)* of a PO.

1. Once you have a new, blank ePro requisition form on your screen, click the **Special Request** tab.

2. Type the appropriate information into the fields *(this is just one example)*:

- **Item Description: Term PO for annual Golf Cart Maintenance and Repairs NTE $xxx.xx 7/1/13 - 6/30/14 incl. all charges.**
- **Price Example: xxx.xx ?** *(Include all costs. No tax).*
- **Quantity: 1   [Note: DO NOT enter quantity greater than one (1)].**
- **Category**: **SVC_5854**
- **Unit of Measure: LOT [Note: DO NOT use any other unit of measure]**
- **Due Date:** Put the date for the last day of service for this term. **Example: 06/30/2014**
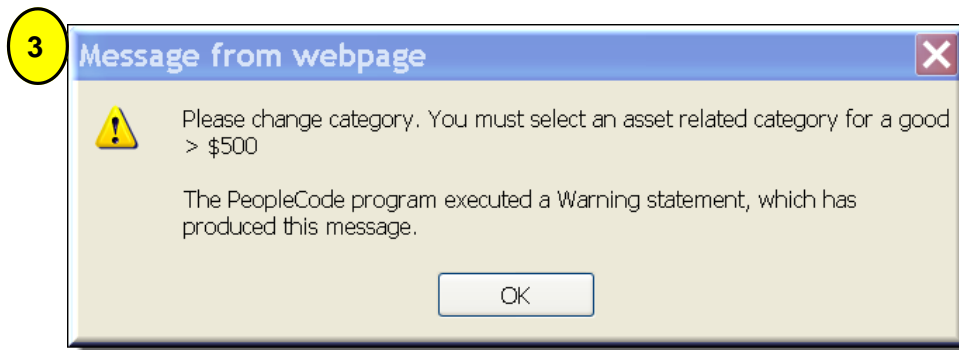- **Vendor: Cart Mart** (or whichever vendor)

Additional Information: First always type your own **name**, **phone**, and **site location**. Include any/all detailed information about where (address, building) service will happen, etc. Include name and phone number of who is authorized to pick up..

3. What is this message (displayed below) that pops up on your screen?

Whenever you enter an item with a unit price of **$500.00** or more you will see this popup.

When ordering an item with a unit price of $500.00 or more, PeopleSoft is designed to send you a reminder to check the category code on your requisition. The system thinks that you are entering an asset and it wants you to change the category. If the item is not an asset just click the OK button and proceed with your requisition.

Message from webpage

⚠ Please change category. You must select an asset related category for a good > $500

The PeopleCode program executed a Warning statement, which has produced this message.

OK

4. *PLEASE BE SURE* to include a quote from the vendor of choice, if you have one. Quotes must accompany their respective ePro requisition forms when submitted for order processing. The preferred method of doing this is to upload the quote as a document file, and attach it electronically to its ePro requisition. To do this task, please see the Job Aid entitled "Attachments" on pages 7-8.

SPECIAL REQUEST LOT ORDER
Only for orders containing 40 or more line items.

1. Once you have a new, blank ePro requisition form on your screen, click the **Special Request** tab.

2. **Item Description:** Type the following information into the Description field: **Lot order books NTE $5000 tax and freight included.** *(note that your pricing might differ...this is just an example)*

- **Price Example: 5000**
- **Quantity: 1**
- **Category**: **GDS_4201** *(for library processed books)* or **GDS_4301** *(for all other books except Adopted Texts)*
- **Unit of Measure: LOT**
- **Due Date:** Put a future date. **Example: 06/30/2014 (Note: this date must be 2 to 4 weeks out)**
- **Vendor:** Pick the correct vendor **AND** the correct location/address.
- **Additional Information:** Always type your **name**, **phone**, and **site location**. Include the number of individual book titles **(must be over 40).** Also type in: **Detailed list of book information to be attached to the requisition.**

3. What is this message (displayed below) that pops up on your screen?

Whenever you enter an item with a unit price of **$500.00** or more you will see this popup.

When ordering a single item **(i.e. One piece of Furniture, or one Camera, or one Truck, or one Computer)** with a unit price of $500.00 or more, PeopleSoft is designed to send you a reminder to check the category code on your requisition. The system thinks that you are entering an asset and it wants you to change the category. **Note: When ordering 1 LOT, you 'll get the message below if your 1 LOT order is more than $500.00.** If the item is not an asset just click the OK button and proceed with your requisition.

3 **Message from webpage**

⚠ Please change category. You must select an asset related category for a good
> $500

The PeopleCode program executed a Warning statement, which has
produced this message.

OK
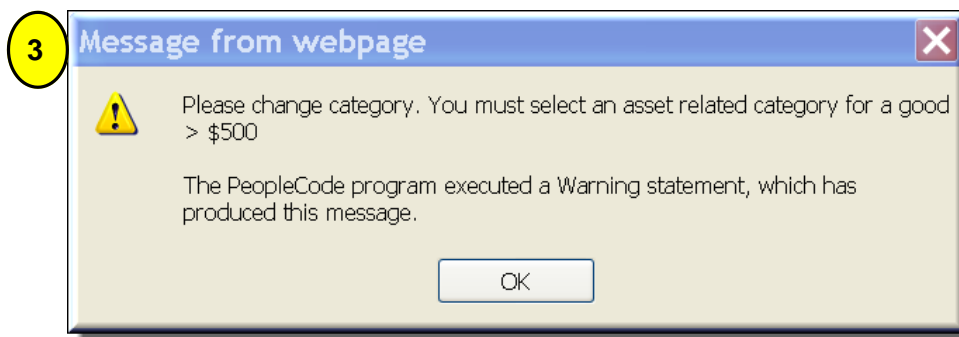
IF AN ITEM IS AN ASSET - THEN IT MUST BE A SEPARATE LINE ITEM AND NOT PART OF A LOT LIST.

4. *PLEASE BE SURE* to include a quote from the vendor of choice, if you have one. Quotes must accompany their respective ePro requisition forms when submitted for order processing. The preferred method of doing this is to upload the quote as a document file, and attach it electronically to its ePro requisition. To do this task, please see the Job Aid entitled "Attachments" on pages 7-8.

ASSET ORDERS

Assets must be ordered differently from all other orders.

What is an Asset?

SDUSD establishes that an item is an **Asset** if it meets the following criteria:

- The item is worth $500 or more per unit.
- The item is a Good *(a physical item, not a service)*.
- The item is non-consumable *(it can't be diminished or used up)*.
- The item is cheaper to repair than to replace.
- **The "Ship To" location should always be "5983A"**

The illustration below depicts a correct order for a typical Asset item.

Item Description: Enter this just like any Goods item description, except use **ALL CAPITAL LETTERS. (Noun, Manufacture, and Model Number)**

Category: Use the correct Asset Category.

Except for the **Item Description** and **Category** fields, which must be done differently, complete all the rest of the fields as you normally would for any typical Goods Special Request item.

Special Requests ②

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description	PRINTER HP P401 4N LASERJET PART# ABC123		
*Price	1,200	*Currency	USD
*Quantity	1	*Unit of Measure	EA
*Category	A_COMP_PRINT_L464	Due Date	06/30/2013

Supplier

*Supplier ID	000002287	
Supplier Name	Scholastic, Inc	Suggest New Supplier

Additional Information

Mary Doe (619) 555-5555 ABC School. Need new printer for expanding office. 12 year old printer broke down & cannot be repaired

☐ Send to Supplier   ☐ Show at Receipt   ☐ Show at Voucher

Request New Item

☐ Request New Item   An email notifictaion will be sent to a buyer regarding this new item request

If you aren't sure whether an item is an Asset, *always ask!*

DIRECT CONNECT ORDERS (Waxie, Independent Stationary (IS), etc.)

Waxie, Independent Stationers, Lakeshore, Grainger and Office Depot… are a few of the vendors many people across the district commonly use. As you know, ordering from these and other common vendors involves the use of **DIRECT CONNECT**, which is a special screen within the eProcurement system.

You were trained on how to order by Direct Connect when you attended the eProcurement training class. Here is some important information you need to remember about using Direct Connect:

- **Direct Connect** orders **must** be made on a **separate** eProcurement requisition order form, by themselves.
- **NEVER MIX Direct Connect** orders with **any other order**…**no inventory or stock items**, and no other Special Request order items.
- If you order something from a **Direct Connect** vendor that costs **$500** or more per unit, then you must **REMEMBER to change the Category to an Asset Category and SHIP TO the warehouse (5983A)** and not leave it as a regular Goods Category. Otherwise, DO NOT CHANGE this field.
- If you are not using the account numbers below, change the category. Otherwise, **DO NOT CHANGE** this field.

VENDOR	ACCOUNT
Direct Connect Fisher	4301
Direct Connect Frey	4301
Direct Connect Grainger	4315
Direct Connect Graybar	4315
Direct Connect HD Supply	4315
Direct Connect IS Group (Independent Stationers)	4301
Direct Connect Lakeshore Learning	4301
Direct Connect Office Depot	4301
Direct Connect School Specialty	4301
Direct Connect Waxie	4302

When entering direct connect vendors:

- Select all your lines, and
- Then go to 'mass changes'
- DO NOT put anything in the category if you're wanting to buy the material under 4301, the field looks blank, but it isn't.
- There's a category tied to the direct connect vendor.
- When you type something in this field, it overrides what's there, causing the assigned Buyer to change on your order. This will cause a delay in processing the order.

COMPUTER AND HARDWARE ORDERING

1. Identify the current computer model available

For District Standard Equipment:

Contact District Pricing: www.sandi.net/pricelist
- Select computers
- Enter employee ID number and DWA password
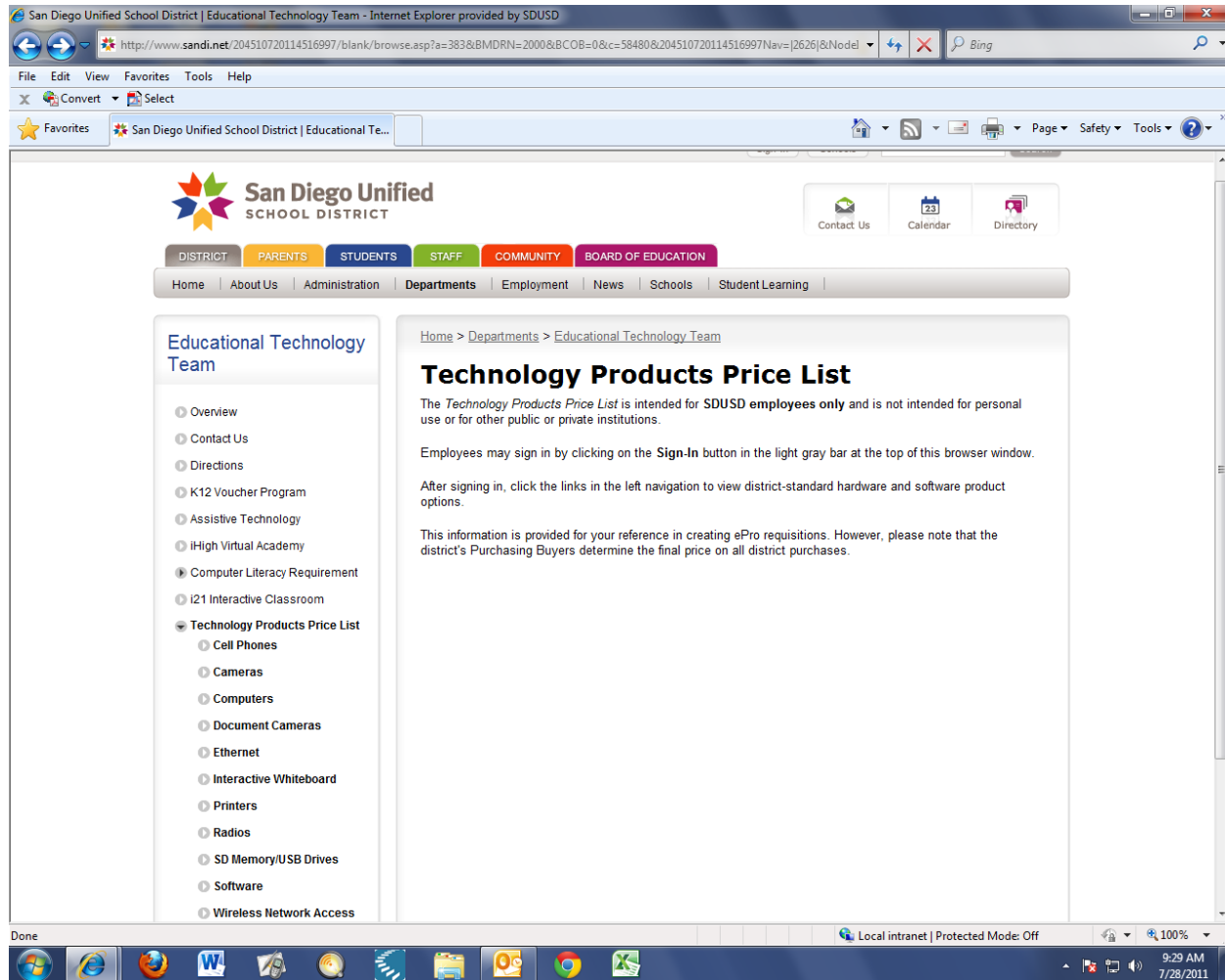
1. Ordering DISTRICT STANDARD Computers

- Order all District Standard computers by selecting the "**template**" tab on create requisition
- Type in "Apple" or "Lenovo" in the search field (example below)
- Use the template name found on ww.sandi.net/pricelist
- Select the template desired, enter quantity, and click "add"
- To complete order, select "Review and Submit", complete required fields, budget check, and "Submit"
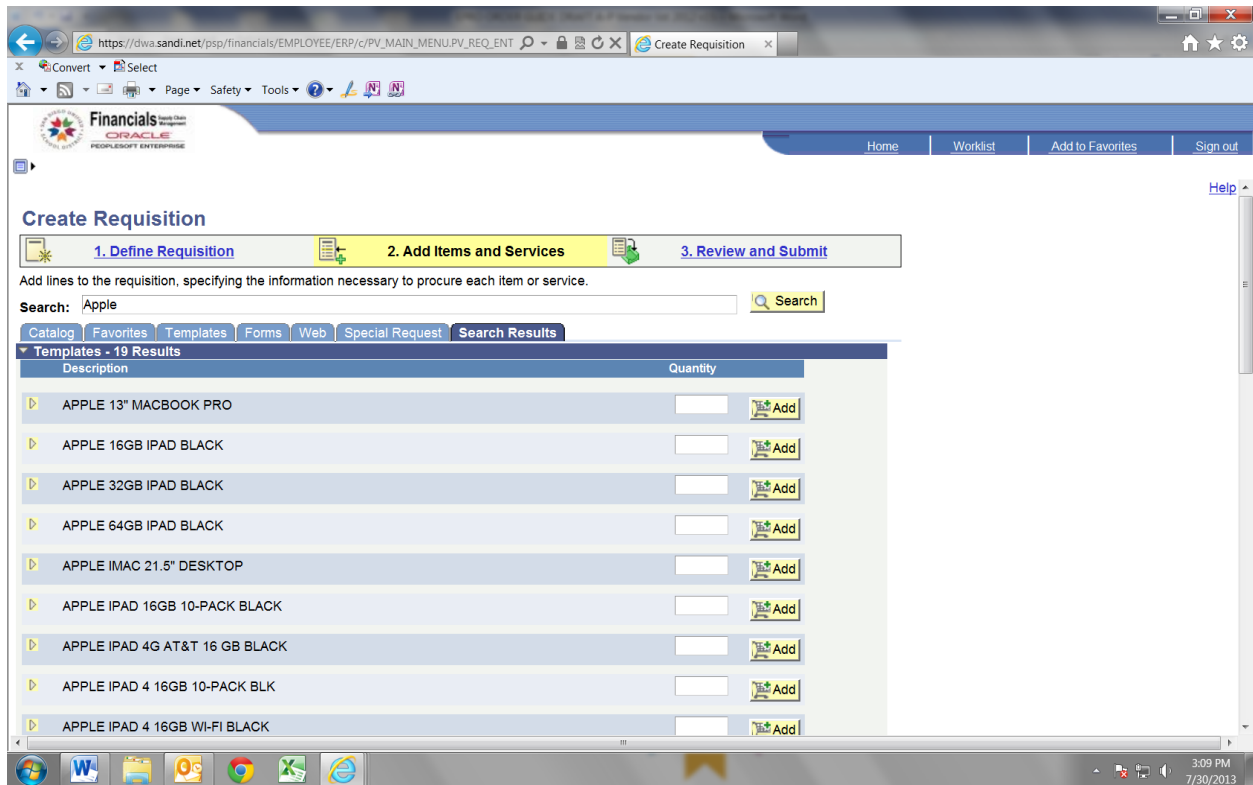
2. K-12 Voucher Program Funding (optional: subject to approval)

- See additional information online at the District web site, WWW.SANDI.NET under: Departments > Integrated Technology Support Services (ITSS) > Educational Technology Team
- For the eligible products: http://tiny.cc/sdvoucher
- Or contact the Educational Technology Team at 858-503-1707 with questions.

3. Ordering NON-DISTRICT STANDARD Computers

- You must first obtain approval from the Integrated Technology Support Services (ITSS) by completing the "Exceptions Form - Hardware or Software" found at http://www.sandi.net/page/824. (see below)
- Login to site using your regular District USER ID and password

Once approved, enter requisition as a "special request" order, ensuring the following information is included:

- **Item Description:** Type in each line description as per valid computer model quote (PDF)
- **Price Example:** Type in each price amount as per valid computer model quote (PDF) *(No tax).*
- **Quantity:** as needed
- **Category**: as needed (Asset if over $500.00: A_COMP_EQUIP_L4640)
- **Unit of Measure:** EA
- **Due Date:** Put a future date (Example: 06/30/2014)
- **Vendor:** Currently Arey Jones (for IBM Lenovo computers), Apple (for Apple computers) or SDUSD (for software licensing package fee which is entered on a separate requisition line)
- **Additional Information:** First always type your own **name, phone**, and **site location in the requisition line (# 1) comments**. As an example: "*Questions, please contact: Chris Doe; Information Technology; Ed Center Rm. 1017; (619) 555-1234 (Office); (619) 555-74321 (Fax); cdoe@sandi.net*".

4. *PLEASE BE SURE* to include the appropriate PDF file of the quote from the vendor of choice. Quotes must accompany their respective ePro requisition when submitted for order processing. The preferred method of doing this is to upload the quote as a document file, and attach it electronically to its ePro requisition. To do this quick and easy task, please see the "ATTACHMENTS TO ORDERS" on pages 7-8 of this guide. If you are unable to attach the document electronically, then please fax it to the Strategic Sourcing and Contracts (Purchasing) Department with the requisition's ID number on the fax.

MANAGE REQUISITIONS

MONITOR YOUR REQUISITIONS DAILY
NOTE: Contact SSC if you have not received your goods by 30 days after the PO date.

Once you made your order, below is a tip for checking to see if you have pending requisitions that your department has not yet approved or still yet to be sourced and dispatched.

Always set the "Request Status" to "All But Complete". This will catch all your open Requisitions.

Always enter you employee ID and make the "Date From" BLANK. **Requisitions. This will allow you to view all your open Requisitions**.

FIELD TRIPS - RESERVATIONS

FOR ALL DISTRICT FIELD TRIPS: Vendors require a Purchase Order to hold the reservation and guarantee payment. *(Some vendors will require payment in advance)*

IMPORTANT!!
Most vendors require the PO to be received 2-4 weeks prior to the event date.

Submit these requests 6-8 weeks prior.

To start the process:
- Process the request on a Special Request e-Pro/Requisition.
- When the e-Pro/Requisition is created please attach the copy of your Trip Tracker Field trip Detail form and the reservation/confirmation/invoice form to the e-Pro/Requisition ***immediately***.   (See the section for attaching documents in this guide).
- If you do not have scanning capabilities, fax it to purchasing ***immediately***.
- e-Pro/Requisition number must be on the faxed paperwork.

REMEMBER: Delays in receiving the reservation/confirmation/invoice will slow down the process to issue the Purchase Order.

Our Strategic Sourcing and Contracts Department requires the following information:
- A copy of the vendor's reservation/confirmation/invoice. Documentation ***must*** have the name, address, phone and fax for the vendor.
- A copy of your Trip tracker form
- The reservation needs to state:
    - Type of event
    - Date of the event
    - Time of arrival
    - Cost per person or group
    - Name of the school and contact.
- Use a vendor already exists in the system, (if possible).

Note in the e-Pro/Requisition:
- Reason for the trip.
- Class or grade level of the students.
- Teacher(s) in charge.

The paperwork must be submitted in time for a PO and warrant, if required, to be issued in advance of the event.

Strategic Sourcing will issue and fax the Purchase Order directly to the vendor. If payment in advance is required, the PO and reservation/confirmation/invoice will be emailed to Accounts Payable for the issuance of the warrant. Accounts Payable will verify the information, issue the warrant and mail the payment to the vendor, unless other arrangements are made to pick up the warrant at the Ed Center.

FIELD TRIP CONFIRMATION LETTER EXAMPLE

THE MUSEUM OF TOLERANCE

9786 W. Pico Blvd
Los Angeles, CA 90035
(310) 772-7639
Fax (310) 772-7627

Confirmation Letter

June 07, 2013

Mary Doe
Golden Hills Middle School
1240 33rd St
San Diego, CA 92102

Dear Mary Doe   :

I would like to take this opportunity to thank you for your interest in the Museum of Tolerance. This letter serves as a confirmation of your visit on July 03, 2013 at 11:06am for 53. The reservation number is 174989. Your three hour visit will include most, not all, of the museum exhibits, and there are no breaks during the tour. **The tour begins at your scheduled time, and late arrivals will not be guaranteed the full museum experience.**

We accept checks, Visa, MasterCard and American Express. One check should be made for the full amount and there are <u>no refunds or exchanges</u>. Please submit the enclosed Reservation Confirmation tear-off with your payment by 06/21/2013, or call the field trip department with credit card information. Please direct any questions regarding payment of admission fees to Group Reservations at (310) 772-7639.

For the protection and safety of all visitors, **please read the attached Bus and Security information.** Please share this information with the assigned teachers in order to better prepare students for your Museum visit.

For more helpful information, please visit our website, www.museumoftolerance.com and click on "Teacher's Guide," for pre and post visit lessons aligned to the State Standards.

Thank you for your cooperation. We await your prompt reply. We look forward to making your visit an exceptional Museum experience.

Sincerely,

Marc Lynn Coordinator, Field Trip Coordinator

--------------------------Tear-off-----------------------------------

Museum of Tolerance Confirmation Form

Reservation Number: **174989**   TOTAL ENCLOSED $_____ (Do Not Send Cash)
Date of visit: **July 03, 2013**
Time of visit: **11:06am**

____ STUDENTS   @ $10.50 EACH $_____
____ ADULTS   @ $10.50 EACH $_____

FIELD TRIP CONFIRMATION INVOICE EXAMPLE

THE MUSEUM OF TOLERANCE

9786 W. Pico Blvd
Los Angeles, CA 90035
(310) 772-7639
Fax (310) 772-7627

INVOICE

Invoice Number : 174989

Invoice Date : June 07, 2013

Mary Doe
Golden Hills Middle School
1240 33rd St
San Diego, CA 92102

Date	Description	No. of Participants	Price	Total Cost
July 03, 2013	Visit to Museum of Tolerance	53	$10.50 per person	$556.50
July 03, 2013	Processing Fee			10.00
			Total Due:	$566.50

Payment is requested by 06/21/2013

Please make checks payable to:

Museum of Tolerance
9786 West Pico Blvd.
Los Angeles, CA 90035
Attn: Field Trip Office

For any questions, please call (310) 772-7639.

FIELD TRIP PURCHASE ORDER EXAMPLE

Purchase Order

San Diego Unified School Dist
Strategic Sourcing Department
2351 Cardinal Ln Bldg M
San Diego CA 92123-3799
United States

Dispatch via Print

Purchase Order	Date	Revision	Page
0000210970	07/01/2013		1

Payment Terms	Freight Terms		Ship Via
Immediate	Destination		YOUR WAY

Buyer	Phone	Currency
Kathleen Herman	858 522 5824	USD

Vendor: 0000001702
Museum Of Tolerance
9760 W Pico Bl
Attn Valerie Browne
Los Angeles CA 900354720
Fax:-

Ship To: Golden Hill K-8
1240 33rd St.
San Diego CA 92102
United States

Bill To: Accounts Payable
4100 Normal St Rm 3141
San Diego CA 92103-2653
United States

General Terms and Conditions of Purchase can be found at - http://www.sandi.net/Page/50186

Line-Sch	Item/Description	ISBN	Quantity UOM	PO Price	Extended Amt	Due Date
1- 1	Pay in Advance: Invoice 174989, Dated June 07, 2013 Admission for 53 students and chaperones of Golden Hills K-8 to visit the museum on July 03, 2013.		1.00 UN	566.50	566.50	07/02/2013

Schedule Total   566.50

Item Total   566.50

Accounts Payable

Please issue warrant and HOLD for Pick-up.

Please contact   Mary Doe   when warrant is ready: Her Cell: 619-555-5555

Total PO Amount   566.50

SAMPLE PO

Authorized Signature

Arthur S. Henly Jr.

PAY IN ADVANCE - HOTELS

All hotels require payment in advance.

IMPORTANT!!

Submit these requests 6-8 weeks prior.

Most hotels want the payment to be received 2-4 weeks prior to the arrival date.

The paperwork needs to be submitted in time for a PO and warrant to be issued and mailed to the hotel.

To Start the Process:

- Process the request on a Special Request E-Pro.
- When the E-Pro/Requisition is created please attach the reservation to the E-Pro/Requisition *immediately*. (see the section for attaching documents in this guide)
- If you do not have scanning capabilities, fax it to purchasing *immediately*.
- E-Pro/Requisition number must be on the faxed paperwork.

Remember: Delays in receiving the hotel information will slow down the process to issue payment in advance.

***Only* lodging for students, parents and non-district staff can be included in the requisition.**

All District personnel hotel costs are to be submitted on Travel Authorizations.

Strategic Sourcing and Contracts requires the following information:

- A copy of the hotel reservation/confirmation.
- Hotel reservation/confirmation must state
    - o Hotel name
    - o Hotel address
    - o Hotel phone and fax
    - o The number of rooms
    - o The room charge
    - o The tax rate that will be charged
    - o Check in and check out dates.
- Use a vendor already exists in the system, (if possible).

Note in the E-Pro/Requisition:

- Reason for the trip.
- Class or grade level of the students.
- Teacher(s) in charge.

Upon receipt of the paperwork a pay in advance Purchase Order will be issued. A copy of the PO and the reservation will be emailed to Accounts Payable and to the requestor. Accounts Payable will verify the information, issue the warrant and mail the payment to the hotel, unless other arrangements are made to pick up the warrant at the Ed Center.

PAY IN ADVANCE INVOICE EXAMPLE

CONSIDER YOURSELF BOOKED

Hilton
HOTELS & RESORTS

Hilton Bellevue
300 112th Avenue SE | Bellevue | WA | United States 98004
T: 1-425-455-1300 | F: 1-425-455-0466

| Rooms & Suites | | Dining | | Amenities & Services | | Map & Directions |

Please be advised that select rooms will undergo renovations February 1, 2014 through April 30, 2014.

Thank you for booking with us,

Confirmation: 3110778969   **Modify Reservation**

Arrival: 02 Mar 2014 3:00 PM

Departure: 05 Mar 2014 12:00 PM

eStandby UPGRADE
- You are eligible for a custom upgrade for as little

$5 EXTRA

Upgrade with eStandby

Rate Information:
Rate Type:
  FRENCH AMERICAN
Rate per night: 179.00 USD
Total for Stay per Room:
    Rate   537.00 USD
    Taxes   77.33 USD
    Total   614.33 USD

Total for Stay: 614.33 USD
Includes estimated taxes and service charges. (Gratuities not included.)

Tax:
• 14.40% per room per night

Additional Charges:
• Valet parking: 20.00/night   Self parking: 15.00/night

Room Information:
Rooms: 1
Clients: 1 Adult
        Non-Smoking Confirmed
Room Type: 1 KING BED
Preferences: King
Your room type preferences have been submitted with your reservation, and are subject to hotel availability.

Rate Rules and Cancellation Policy:
• Your reservation is guaranteed for late arrival.
• Please contact us should you need to cancel your reservation.
• Cancellations are required by 11:59 PM on 01 Mar 2014 local hotel time.
• Cancellation penalties may apply.

BRAND NEWSLETTER OPT-IN – Sign Up Here ▶

PAY IN ADVANCE PURCHASE ORDER EXAMPLE

Purchase Order

San Diego Unified School Dist
Strategic Sourcing Department
2351 Cardinal Ln Bldg M
San Diego CA 92123-3799
USA

		Dispatch Via Email
Purchase Order 0000224963	**Date** 2/10/2014	**Revision**
Payment Terms Immediate	**Freight Terms** Destination	**Ship Via** YOUR WAY
Buyer Kathleen Herman	**Phone** 858 522 5824	**Currency** USD

Supplier: 0000000225
Hilton Hotels
300 112th Avenue SE
Bellevue WA 98004
USA

Ship To: 0925A
San Diego French-
American Sch
6550 Mt Soledad Bl
San Diego CA 92037
USA

Attention: JoAnna
Andrea
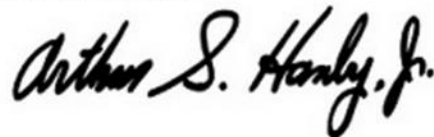
Bill To: Accounts Payable

4100 Normal St Rm 3141
San Diego CA 92103-2653
USA

General Terms and Conditions of Purchase can be found at - http://www.sandi.net/Page/50186

Line-Sch	Item/Description	ISBN/Manufacturer ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1 - 1	PAY IN ADVANCE: Confirmation #3110778969 Lodging for SD French American private school teacher, Elisabeth Perdereau, while attending the "Reading and Writing Strategies" workshop.		3.00	DAY	204.78	614.33	02/17/2014

	Schedule Total _____ 614.33

Lodging for SD French American private school teacher,
while attending the "Reading and Writing Strategies" workshop.
Confirmation #3110778969,
Check in/out 3/2/2014 - 3/5/2014.
Room rate $179 plus 14.40% of $25.78 = $204.78 per night x 3 nights, total $614.33.

District contact: Mary Doe -619-555-1234

Item Total _____ 614.33

Accounts Payable

Please mail warrant when issued

Thank you

Total PO Amount 614.33

SAMPLE PO

Authorized Signature

Arthur S. Hanly, Jr.

CONFIRMING ORDERS

Confirming orders are against District policy.

(See Administrative Procedure 2415, Section C.4)

A confirming order happens when there is a District purchase for goods or services that is placed without the issuance of an approved requisition and purchase order. The requisition is then issued after the purchase, and the purchase order 'confirms' the purchase.

Requestors should ensure administrators and teachers know that purchasing material and then submitting a requisition to cover the purchase is not allowed.

If you violate the policy above and you must use the invoice to issue the E-Pro/Requisition.

- Issue the E-Pro/Requisition to match the invoice.
- Create a line for each item and shipping, include the description on each line.
- DO NOT ADD A LINE FOR TAX ON THE E-PRO/REQUISITION. PeopleSoft calculates the tax automatically.
- Enter the correct vendor on the E-Pro/Requisition
- If the Vendor is new, enter vendor name, address, contact information, and obtain the Vendor's W-9 Form.

If you violate the policy and need a confirming order, when you submit the requisition you will receive an email from Strategic Sourcing and Contracts stating:

_____

THIS PURCHASE ORDER REQUIRES ACTION ON YOUR PART

This Purchase Order has been processed to allow for the payment of your confirming order requisition.

Because your confirming order Requisition is for materials or services already received, this Requisition is in violation of Administrative Procedure 2415, Section C.4. It is important that your location review Section C.4 at this time.

Please forward the Original Invoice to the Accounts Payable Department located at the Eugene Brucker Education Center. The Purchase Order number must be written on the invoice to facilitate payment.

Accounts Payable cannot process request for payment without complete documentation.

_____

This email will be sent to the ePro requestor, Approving Administrator, Contracts Service Manager, the Area Superintendent, and A/P Technician.

Independent Contractor Agreements

. The Independent Contract Agreement (ICA) form was developed to assist site administrators, department heads, principals, and programs to contract with minor consultants, resource persons or student service providers on a one page agreement form. The cost for these providers cannot exceed $10,000.00 in any one fiscal year. No additional terms, conditions or contractor forms requiring individual site signature(s) are authorized. Only School Board designated individuals are authorized to sign contractor forms. Below is the overall procedure for processing an ICA. Please see the SSC website for more information.

Site Completes Independent Consultant Agreement (ICA) Form
(NOTE: This process is to be used for services agreements under $10,000)

1. Complete all required information on the ICA form including: **valid** ePro/ requisition #
   (Contact Budget Analysts if budget error occurs)
2. Ensure consultant /vendor signs ICA Form, with Fed ID No. or SS #.
3. Provide completed description of service being rendered.
4. Provide start and end date of service (s).
5. Provide Unit Price or rate of pay /compensation with the total amount of service for fiscal year.
6. Provide Budget resource code and description requirements: EXAMPLE: Budget String: 0000.00000

Submit ICA form with these forms attached if required:

- W-9 Form (use **only** if the vendor is not in PeopleSoft already).
- CALIF 590 Form (use form **only** if an out of state vendor).
- Guidelines for Classified Employee (use this form only if consultant is a previous employee of District).
  FALURE TO PEROM ALL STEPS ABOVE WILL STOP THIS PROCESS

Follow the Internal Approval Process:

1. Submit to Site Administrator for review and approval signature.
2. Submit to Dept. and /or Cabinet Executive for review and approval signature.

InterOffice email ICA with all approved documents attached to: **Strategic Sourcing and Contracts (SSC): ATTN: John Groll.**

Strategic Sourcing and Contracts Dept will:

1. Review, approve and/or disapprove all documents submitted.
2. SS & C will verify the ePro/requisition is valid.
3. SS &C will place on Board of Education (BOE) Agenda Items with recommendation for approval.
4. Create valid PO following BOE Approval.

SSC Staff will submit the approved ICA's thru the appropriate Approval Tree(s).

1. SS & C Staff
2. SS & C Officer
3. Legal Review
4. CFO Review
5. BOE approval

STRATEGIC SOURCING & CONTRACTS POINT OF CONTACT FOR AREA SCHOOLS
[For help with Independent Contractor Agreements (http://www.sandi.net/page/2083) & Non-ICA Agreements (http://www.sandi.net/page/2082)]

Kathy Herman 858-552-5824 kherman@sandi.net	Mark Floyd 858-552-5815 mfloyd@sandi.net	Julio Gomez 858-552-5867 jgomez1@sandi.net	Karl Bunch 858-552-5823 kbunch@sandi.net	Liz Gabbard 858-552-5822 lgabbard@sandi.net	Kat Smolen 858-552-5811 ksmolen@sandi.net
Area 1 **Shirley Wilson**	**Area 2** **Lamont Jackson**	**Area 3** **Julie Martel**	**Area 4** Judy Tenorio - Interim	**Area 5** **Mitzi Merino**	**Area 6** **Gil Gutierrez**
Crawford Cluster Crawford High Mann Middle Carver Elementary Clay Elementary Euclid Elementary Fay Elementary Ibarra Elementary Marshall Elementary Oak Park Elementary Rolando Park Elementary **Lincoln Cluster** Lincoln High Knox Middle Millennial Tech Baker Elementary Balboa Elementary Chavez Elementary Chollas/Mead Elementary Encanto Elementary Horton Elementary Johnson Elementary Nye Elementary Porter Elementary Valencia Park Elementary Webster Elementary	**Mira Mesa Cluster** Mira Mesa High Challenger Middle Wangenheim Middle Ericson Elementary Hage Elementary Hickman Elementary Mason Elementary Sandburg Elementary Walker Elementary **Morse Cluster** Morse High Bell Audubon K-8 Bethune K-8 Boone Elementary Freese Elementary Fulton K-8 Lee Elementary Paradise Hills Penn Elementary Perry Elementary Zamorano Elementary **Atypical Schools** San Diego MET SCPA **Alternative Schools** Garfield	**Kearny Cluster** Kearny DMD Kearny CTA Kearny IB Kearny SCT Montgomery Middle Taft Middle Angier Elementary Carson Elementary Chesterton Elementary Cubberley Elementary Fletcher Elementary Jones Elementary Juarez Elementary Linda Vista Elementary Ross Elementary Wegeforth Elementary **La Jolla Cluster** La Jolla High Muirlands Middle Bird Rock Elementary La Jolla Elementary Torrey Pines Elementary **Mission Bay Cluster** Mission Bay High Pacific Beach Middle Barnard Mandarin Magnet Crown Point Pacific Beach Sessions **University City Cluster** University City High Standley Middle Curie Elementary Doyle Elementary Spreckels Elementary **Atypical Schools** iHigh Mt. Everest Academy	**Clairemont Cluster** Clairemont High Marston Middle Alcott Elementary Bay Park Elementary Cadman Elementary Holmes Elementary Toler Elementary **Madison Cluster** Madison High CPMA Innovation Middle Field Elementary Hawthorne Elementary Lafayette Elementary Lindbergh Schweitzer Elementary Sequoia Elementary Whitman Elementary **Henry Cluster** Patrick Henry High Lewis Middle Pershing Middle Benchley/Weinberger Elementary Dailard Elementary Foster Elementary Gage Elementary Green Elementary Hardy Elementary Hearst Elementary Marvin Elementary **Atypical Schools** John Muir K-12 Longfellow K-8	**Hoover Cluster** Hoover High Clark Middle Wilson Middle Adams Elementary Central Elementary Cherokee Point Elementary Edison Elementary Franklin Elementary Hamilton Elementary Joyner Elementary Normal Heights Elementary Rosa Parks Elementary Rowan Elementary **San Diego Cluster** San Diego High Complex Memorial Prep Roosevelt Middle Golden Hill K-8 Grant K-8 Logan K-8 Perkins K-8 Birney Elementary Burbank Elementary Emerson/Bandini Elementary Florence Elementary Garfield Elementary Jefferson Elementary Kimbrough Elementary McKinley Elementary Rodriguez Elementary Sherman Elementary Washington Elementary **Atypical Schools** Language Academy K-8	**Point Loma Cluster** Point Loma High Correia Middle Dana Middle Cabrillo Elementary Dewey Elementary Loma Portal Elementary Ocean Beach Elementary Silver Gate Elementary Sunset View Elementary **Scripps Ranch High Cluster** Scripps Ranch High Marshall Middle Dingeman Elementary E.B. Scripps Elementary Jerabek Elementary Miramar Elementary **Serra High Cluster** Serra High DePortola Middle Farb Middle Hancock Elementary Kumeyaay Elementary Miller Elementary Tierrasanta Elementary Vista Grande Elementary **Atypical Schools** San Diego Early Middle College **Alternative Schools** ALBA Twain

GLOSSARY

ICA	Independent Contractor Agreement. This is a contract between SDUSD and an outside contractor to provide services to SDUSD for under $10,000 district-wide per vendor per year.
Lot Order	A "Lot" refers to an amount. A "Lot" is a quantity of 40 or more of any one single object, and those 40 objects are related to one another. For example, 40 individual library book titles, when ordered together at the same time, can be ordered as a single "Lot". Thus, it would be ordered as a single line item on an ePro requisition *(library books)*, but with the caveat that a detailed list of all 40+ books would accompany the order. **A "Lot" MUST have a minimum of 40 individual items in it. Fewer than 40 means it cannot be ordered as a "Lot", and must be entered as a line-by-line Special Request Requisition.**
NTE (Ceiling Price)	Not To Exceed. The maximum dollar amount allowed including all costs such as sales tax and any applicable freight charges.
POC	Point Of Contact. Typically, the name of a person to contact.
Term P.O.	Term Purchase Order. This is a purchase order that obtains a certain goods, services and/or set of services for a defined term of time. Examples are: repair orders, payment of invoices for Professional Service contracts, etc.
Upload	To transmit an electronic file *(such as a PDF file, Word document or Excel spreadsheet)* from your computer to a server *(such as a web server)* another computer, or attachment to a Requision or Purchase order.
Direct Connect Order	Direct Connect is a direct communication configured between two electronic business systems (District and Vendor). For the District, Direct Connect is an online computer feature within the PeopleSoft eProcurement software application. Direct Connect is currently used to order goods from online vendors. To order, a requester connects to the vendor's online system using the web tab within PeopleSoft and selects available products for their shopping cart. After checking out from the vendor's online system, a requisition is created within PeopleSoft for further processing.

Receiving of Goods and Services
(http://www.sandi.net/Page/49145)

Receiving of Goods on Pick-up or School Delivered POs

An electronic "receipt" **must** be created in PeopleSoft to enable Accounts Payable to pay for all goods and services. For schools and sites *without a designated person on site to process sales receipts, packing slips, or invoices into an electronic "receipt"*, the following process will be followed.

For items that are **delivered directly from a vendor to your site** (not from the district warehouse) or **purchased and picked up from a vendor location by a district employee**, the district's Receiving Department will key in the dollar amount and/or quantity to create a "receipt number" that will facilitate payment by Accounts Payable.

For auditing purposes, a copy of the receipt or packing slip must be sent to the Supply Center Warehouse Receiving by either:

1. Scanning and attaching to an email and sent to Supply Center Warehouse Receiving (supctrec@sandi.net).
2. Or faxed to Supply Center Warehouse Receiving at (858.496-8052).

The email or fax MUST contain the following information:

- Sales receipt (for items purchased and picked up from a vendor location) and packing slip (not invoice), is delivered by a Vendor to your location.
- Cash Register Receipt Transaction # (where applicable)
- Total dollar value (including sales tax)
- Purchase Order number

================= Once this has been done =================

1. Make a copy for your Records, and then
2. Send the Original receipt/packing slip to Accounts Payable (Ed Center – Rm#3141), making sure that the Term PO# is referenced on the original documents.

DO NOT SEND ANY ORIGINAL DOCUMENTS TO THE RECEIVING DEPARTMENT

Receiving of Services

An electronic "receipt" must be created in PeopleSoft to enable Accounts Payable to pay for all goods and services. For schools and sites without a designated person on site to process sales receipts, packing slips, or invoices into an electronic "receipt", the following process will be followed.

SERVICES

Upon receipt of an invoice (not a work order) from the service provider, the school/site receiving the service shall have the Principal/Site Manager (or his/her designee) review the invoice for accuracy, legibly print and sign the invoice with a full name, title, and the date signed. This signature is verification that the services have been performed, that the billed amount is correct, and authorizes the Receiving Department to electronically process the invoice (create a "receipt number") for Accounts Payable to remit payment to the provider.

To expedite payment, a copy of the signed invoice, with the **PO number affixed**, is then sent to the Receiving Department via email (supctrec@sandi.net) or fax (858.496-8052) for electronic processing.

– Without this step –
Accounts payable is unable to post payment in the Peoplesoft system.

DO NOT SEND ANY ORIGINAL DOCUMENTS TO THE RECEIVING DEPARTMENT

Original invoices are then forwarded to Accounts Payable (Ed Center, Room #3141). Verify that the PO number is referenced on the Invoice, if it is not on the invoice, then write it on the Invoice to ensure that the correct Purchase Order is being charged.

DIRECTIONS and URLs TO USEFUL WEB PAGES

- **SDUSD Training & Resources Website:** www.sandi.net →Staff → Technical Support & Resources → PeopleSoft → Training or Support links *(login with your SDUSD employee ID and password)*. http://www.sandi.net/Page/58612

- **PeopleSoft Training & Support Website**: Click HERE or go online to this path: www.sandi.net → Staff → Technical Support & Resources → PeopleSoft: http://www.sandi.net/site/Default.aspx?PageID=1751

- **For computer and technology pricing:** www.sandi.net/pricelist

- **Strategic Sourcing and Contracts:** www.sandi.net → Departments → Strategic Sourcing and Contracts.   http://www.sandi.net/Page/2079

- **ICAs (Independent Contractor Agreements):** www.sandi.net → Departments → Strategic Sourcing and Contracts → Independent Contractor Agreement: http://www.sandi.net/page/2083

- **Non-ICA Web Page for processing contracts through the Board of Education:** www.sandi.net → Departments → Strategic Sourcing and Contracts → Contract Intake Processing (Non-ICA) http://www.sandi.net/page/2082

The Five Principles of Public Service Ethics
- By Michael Josephson

The Five Principles of Public Service Ethics

1. **Public Interest** Public office is a trust to be used only to advance public interests, not personal gain.

2. **Objective Judgment** Decisions are to be made on merits, using only proper criteria without partiality or prejudice and unimpeded by conflicts of interest.

3. **Accountability** Government conducted transparently, efficiently, equitably and honorably so public can make informed judgments and hold public officials accountable.

4. **Democracy** Honor and respect democratic principles; observe the letter and spirit of laws in *good faith*.

5. **Respectability** Safeguard public confidence in the integrity of government by avoiding appearances of impropriety and conduct unbefitting a public official.

Michael Josephson © 2014 Josephson Institute

Code of Ethics adhered to by the
Strategic Sourcing and Contracts Department

UPPCC
Universal Public Procurement Certification Council

CODE OF ETHICS

- I will seek or accept a position of employment only when fully in accord with the *professional principles* applicable thereto, and when confident of possessing the qualifications to serve under those principles to the advantage of my employer.

- I believe in the dignity and worth of the services rendered by my employment and the *societal responsibilities* assumed as a trusted public servant.

- I shall be governed by the highest ideals of *honor and integrity* in all public and personal relationships in order to merit the respect and inspire the confidence of my employer and the public served.

- I believe that personal aggrandizement or personal profit obtained through misuse of *public or personal relationships* is dishonest and intolerable.

- I will identify and eliminate participation of any individual in operational situations where a *conflict of interest* may be involved.

- I believe that individuals that *possess UPPCC certification* should at no time or under any circumstances accept directly or indirectly, gifts, gratuities or other things of value from suppliers, which might influence or appear to influence purchasing decisions.

- I will keep my governmental organization informed, through appropriate channels, on problems and progress of applicable operations by *emphasizing the importance of the facts*.

- I will handle all personnel matters on a *merit* basis. Politics, religion, ethnicity, gender and age carry no weight in personnel administration in the agency being directed or served.

- I *shall not seek or dispense personal favors* that are in conflict with my profession.

- I will handle each administrative problem objectively and empathetically *without discrimination*.

- *I subscribe to and support the professional aims and objectives of the Universal Public Procurement Certification Council.*